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Agent Desktop Agent's Guide

Internal interactions

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Internal interactions are communications between you and other people inside your company, such as call and chat consultations, call, chat, and email transfers, and also messages to you from your system or administrators. Internal interactions also include call and chat conferences that involve you, another internal party, and a contact.

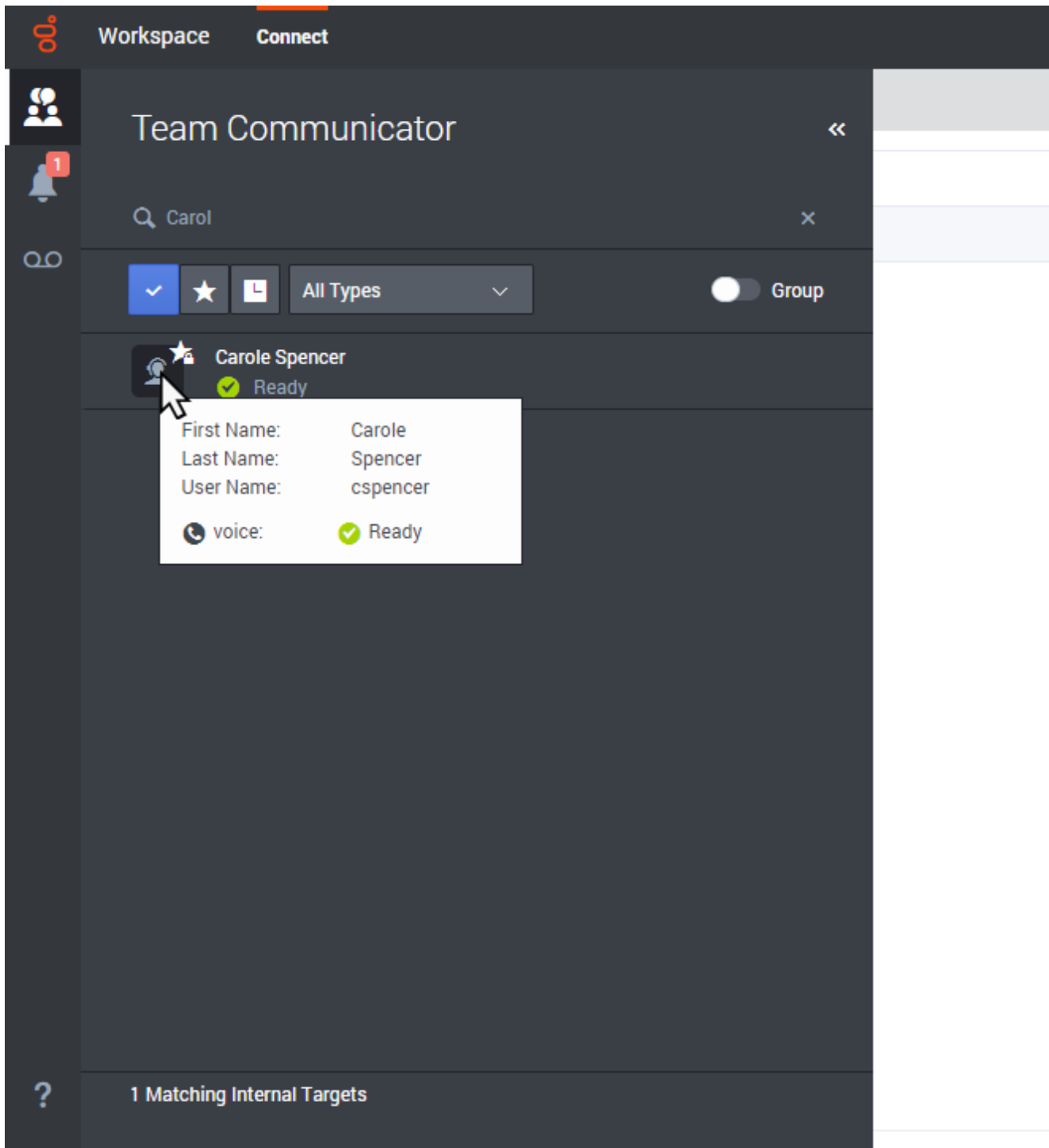
Related documentation:

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Important

Due to continual changes to Agent Desktop, screen shots in this manual might present interface elements that are not yet available for this product or might not accurately reflect what you can access in the product when you use it.

How do I contact people in my company?



The Team Communicator tool lets you search through your company directory for an agent, team lead, agent group, or other targets that you want to call, consult with, or transfer to.

Type in the name of the person that you want to call, then hover your mouse pointer over their name in the list of search results. A pop-up is displayed that lets you know whether that person is ready to take a call, is on a break, is busy, or is logged off.

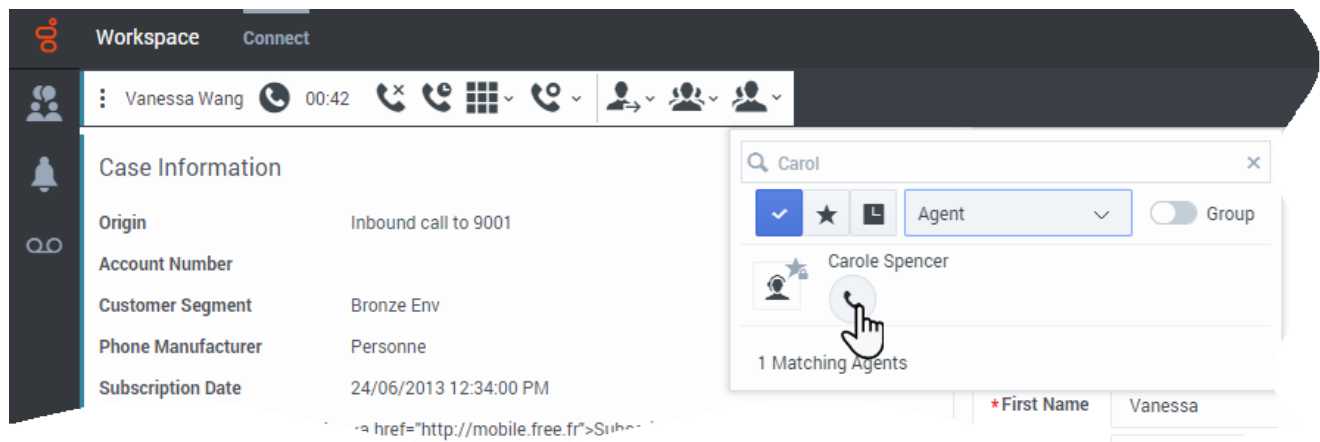
If the person is available, use the action menu to call them. If not, try a different channel or try again later.

Note: The video might show some features that are not yet available in this release of Agent Desktop.

What's the difference between a consultation and a conference?

Both activities involve getting help from an agent or supervisor. Consultations let you communicate with a team member privately while handling an interaction. Conferences let someone else from your contact center join the chat or phone call with your contact. If you want to perform a warm transfer or a two-step transfer, click Consult to talk to the consultation target and then click Transfer to transfer the call.

How do I start a consultation?



A consultation lets you discuss an active call with another team member. It's different from a conference because the customer is not connected to the session. If you want to perform a warm transfer or a two-step transfer, click

Consult (👤) to talk to the consultation target and then click **Transfer** (👤➔) to transfer the call.



Search your list of team members to find the person or internal target (an agent group, a routing point, or a skill) you want to consult with and select the type of consultation you want. Once connected, you can monitor the status and use the controls as you would for any other interaction.

[Link to video](#)



Some things to keep in mind:

- Either party can end the consultation, but ending the consultation does not end your interaction with the customer.
- If you end the session with the customer, the consultation remains active.
- Consultations are private — the customer can't see or hear your discussions.
- The team member can access the case and contact information.

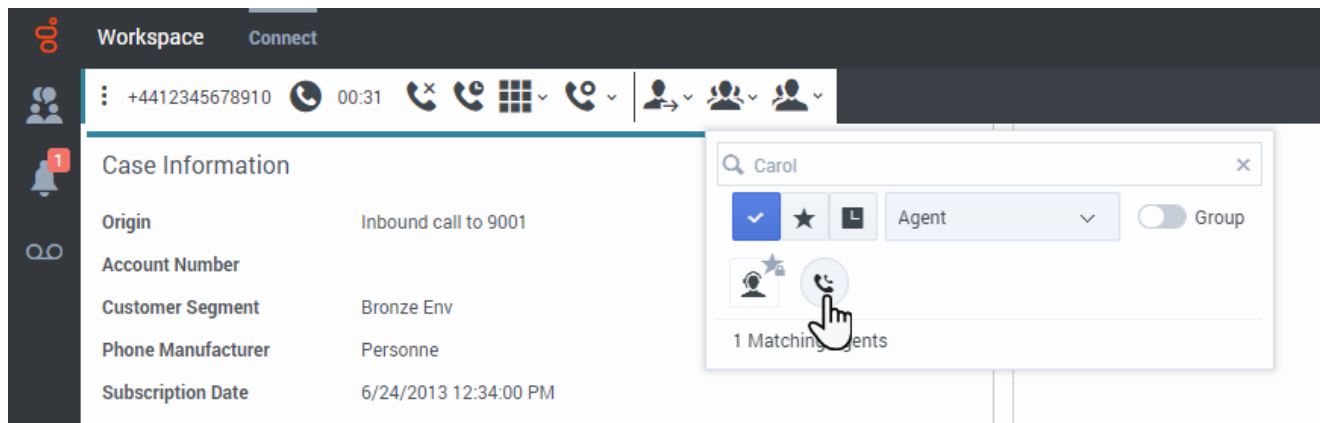
If you are on a call and start a voice consultation, the original call is put on hold while you consult with your selected team member.

- Click the **Resume Call** () to resume the original call (also allows you to toggle between the two calls).
- Click the **End** button () to end the consultation and resume the original call from hold.


Prior to a conference or transfer, you can consult with your team member by selecting **Consult** in the toolbar. After the consultation request is sent, the initial call is put on hold.

While in a consultation, you can also complete a conference or transfer between your team member and your customer. To do this, select **Instant Call Transfer** () or **Instant Call Conference** (), and select the same button beside the desired team member's name.

How do I start a conference?



Starting a conference allows you to add another person to your current call. It's different from a consultation because the customer is also connected to the session.

Click the **Instant Conference** button () to start a conference when handling a voice call.

Search your list of internal targets to find the person, agent group, routing point, interaction queue, or skill that you want to add and then select the conference channel you are requesting. The conference begins as soon as they accept the request. (When sending a conference request to an agent group, the agent availability information might be 10 to 30

seconds behind, so you might have to wait for an agent to become available to join the conference.)

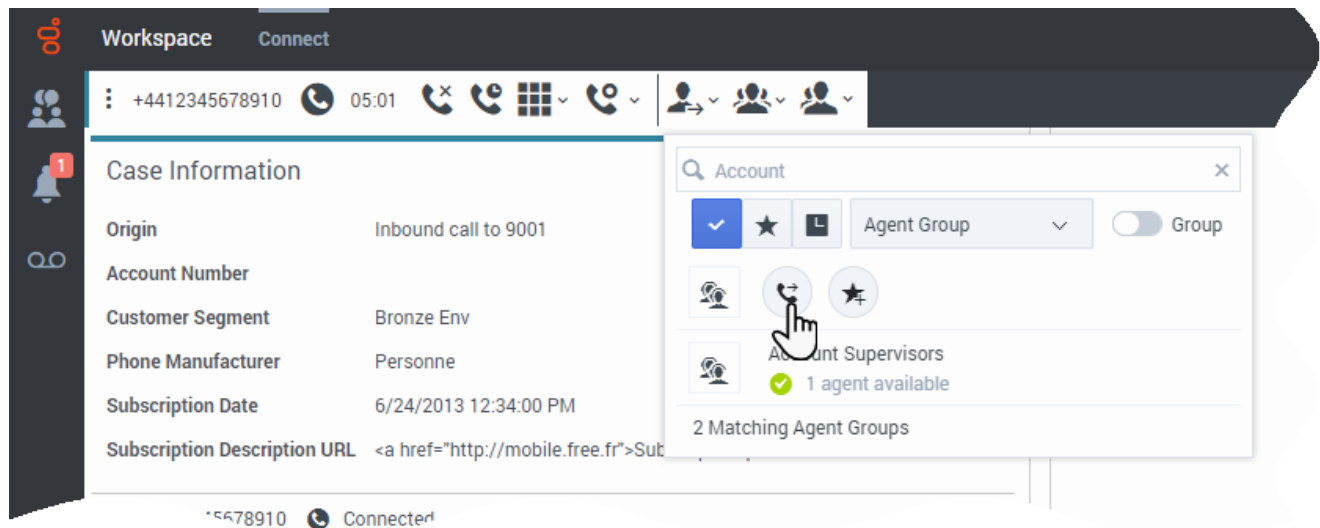
[Link to video](#)

Some things to keep in mind:

- You can always consult with a team member before adding them to a conference.
- In a voice conference, the person you added can choose to release the call. This disconnects them from the conference, but your call with the customer continues.
- If you disconnect from the call but the person you added to the conference is still connected, the call continues without you. Your system might be set up to end the conference after you disconnect if the person that you added is not part of your company.
- Everyone connected to the conference can see or hear what the other parties are discussing, unless you remove or selectively mute a participant.
- Your account might be configured to remove a party from a conference. Select the **Party Action** menu on the Voice Interaction view and select **Drop from conference** to remove that party from the conference.

A team member can select **Leave** to drop from the conference.

How do I transfer an interaction to another team member?



You can transfer a call to another team member instantly, or you can consult with them first. For example, you could put the current call on hold while you talk to another team member to find out whether they will accept the transfer.

Click the **Instant Transfer** button () to transfer a voice call.

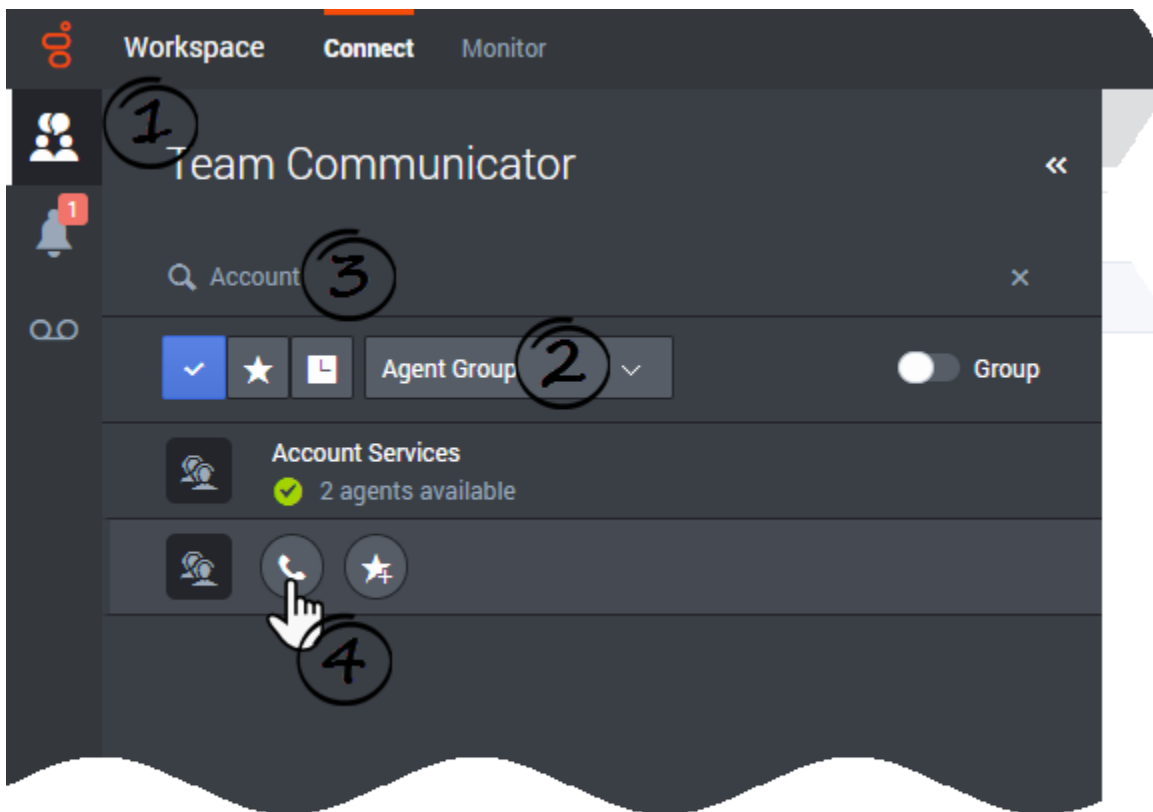
Some things to keep in mind:

-
- Case information might be visible to you, the transfer recipient, or your administrator.
 - If your transfer request is not accepted, you must manually take your contact off hold.
 - If there are no agents available, you might have to wait to transfer the call. (When transferring to an agent group, the agent availability information might be 10 to 30 seconds behind, so you might have to wait to transfer if there are no agents showing as available.)

Watch the video to see how a transfer works.

[Link to video](#)

How do I call an Agent Group?



In some contact centers, agents are assigned to specific groups. For example, some agents in a company might speak different languages, have particular product expertise, or have a higher level of security clearance. These are all specialties that might be associated with an agent's group.

If your administrator has enabled this capability, perform the following steps to call an agent group:

1. Open Team Communicator.
2. Select **Agent Group** from the **Filter by type** menu.

3. Enter the name of the agent group instead of the name of an agent when looking for a team member in the search field.
4. In the search results, click the **Action Menu** drop-down list next to the name of the agent group that you want to call.

Sometimes, no one in the agent group is available to take the call. If your administrator has set up Agent Desktop to display the number of available agents in the agent group, then a message is displayed underneath the group name indicating how many agents are available. If there are no agents available, you might have to wait to make the call.

Important

In some scenarios, the agent group availability information might be 10 to 30 seconds behind.

How do I contact another agent through a Routing Point or Queue?



In some contact centers, calls are handled through a Routing Point, Interaction Queue, or Queue. Instead of transferring, conferencing, or consulting directly with another agent or to a member of an agent group, your environment might be set up to enable you to direct an interaction to another agent through a Routing Point, Interaction Queue, or Queue.

If your administrator has enabled this capability, you can enter the name of the Routing Point, Interaction Queue, or Queue instead of the name of an agent or agent group when looking for a team member.

If your administrator has enabled this capability, perform the following steps to call an agent group:

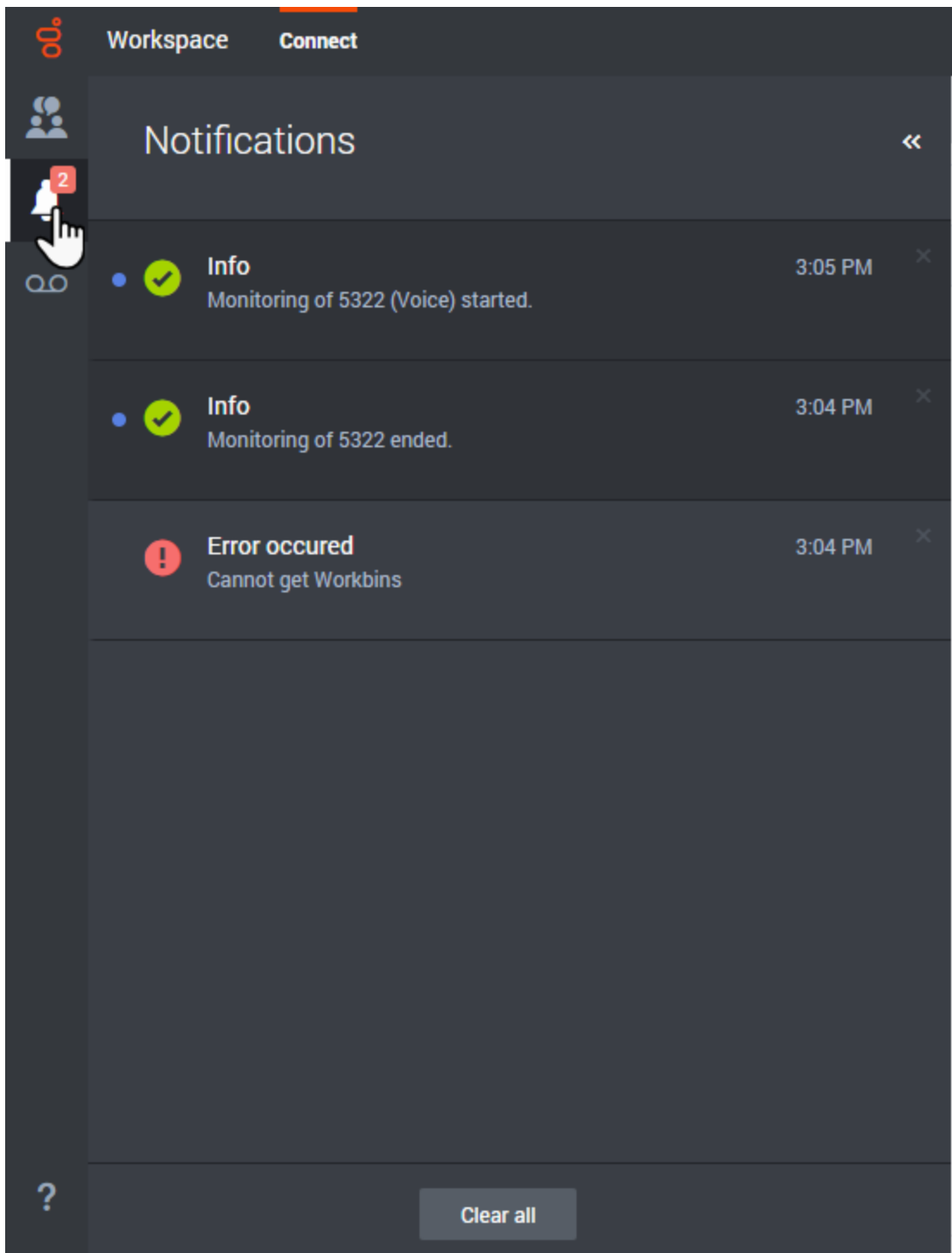
1. Open Team Communicator.
2. Select **Routing Point**, **Interaction Queue**, or **Queue** from the **Filter by type** menu.
3. Enter the name of the Routing Point, Interaction Queue, or Queue instead of the name of an agent or agent group when looking for a team member.
4. Click the **Action Menu** drop-down list that is displayed next to the name of the Routing Point, Interaction Queue, or Queue that you want to target.

Next to the Routing Point or Queue name you might encounter different icons (1, 2, and 3 in the screenshot) that indicate how busy the Routing Point or Queue is. An icon might represent the Average Waiting Time on the target, the number of interactions currently being handled, or some other statistic. These icons help you decide which target to choose or to give you an indication of how long it will be before your transfer, conference, or consultation will be handled.

The following icons might be displayed next to the Routing Point or Queue in Team Communicator:

- **Ready** (🟢): This icon means that there are no issues with targeting the Routing Point or Queue. The number of interactions being handled is below the warning threshold.
- **Warning** (🟡): This icon means the Routing Point or Queue is in a Warning state. The number of interactions being handled is above the warning threshold but below the Error threshold.
- **Error** (🔴): The Routing Point or Queue is in an Error state. The number of interactions being handled is above the error threshold so the Routing Point or Queue is above capacity.

How do I read my notifications?



Notifications


You might receive messages and notifications from the system or your administrator.

When a new notification arrives, a preview notification is displayed (you might also hear a sound/tone play).

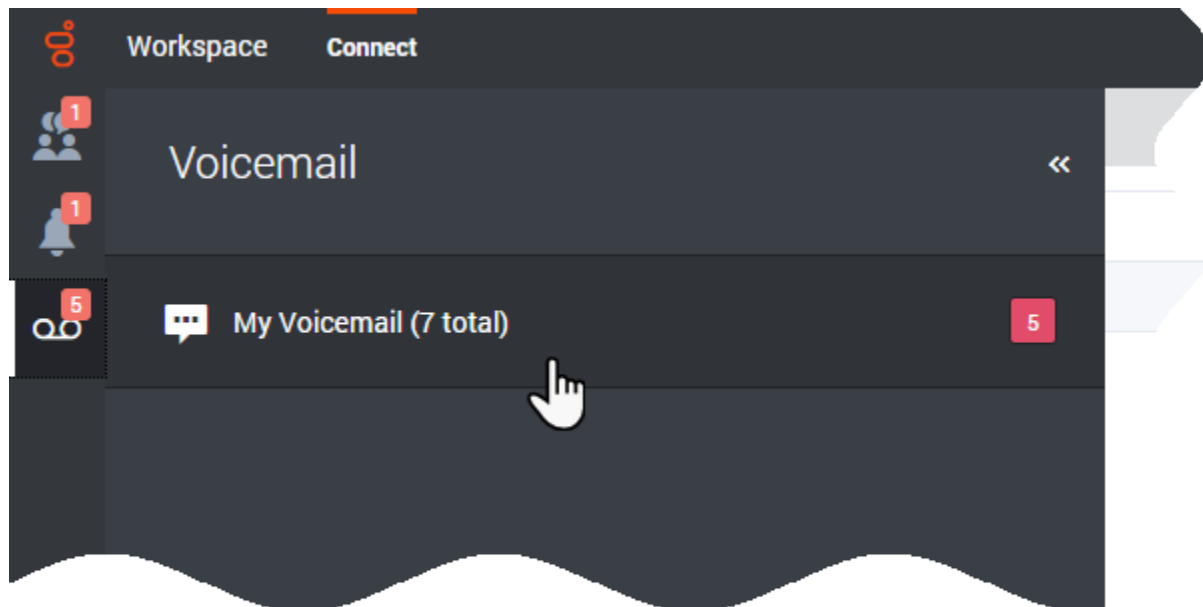
Common notifications include:

- System-based messages (such as when a switch or channel is out of service)
- Voicemails


You can view notifications on the **Notifications** panel. In the Main View, click the

Notifications button (). The most recent notifications are displayed on top, with a color and a status to indicate the priority.

Voicemail




If Voicemail is available for you, the **Voicemail** button () is displayed in the Side Bar toolbar. Clicking the button opens the **Voicemail** panel. The **Voicemail** panel contains a list of your voicemail and, if available, group voicemail boxes.


If you have unheard voicemail messages waiting for you, an indicator is displayed next to the **Voicemail** button and also next to the mailbox. The indicator is a number in a red box: . The number tells you how many unheard messages you have. For screen reader users, when you put the focus on the **Voicemail** button this number is announced to you.

Tip

Hover your mouse pointer over the message waiting indicator to access the number of messages waiting in each of your voicemail boxes.

To access your voicemail box, navigate to the Side Bar toolbar, then click the **Voicemail** button () to open the **Voicemail** panel.

Navigate between mailboxes using the **Up** and **Down** arrows or click the voicemail box you want to open. The **Home** and **End** keys can be used to jump to the first and last entries in the list of voicemail boxes.

To open a voicemail box, select a voicemail box then use the **Tab** key to highlight the **Consult** () button or click it with your mouse. Use the **spacebar**, **Enter** key, or mouse to open the voicemail box. A new internal interaction is launched. Use the keypad to enter your authentication information. Use the **Tab** key or your mouse to access the controls when you play the voicemail message item.

In some environments your account might be enabled to let you call personal and group voicemail boxes that do not contain any messages. In these environments empty mailboxes are displayed in the **Voicemail** panel. This feature enables you to call the mailbox to update the greeting message or listen to old voicemail messages stored in the mailbox.

What next?

- Calls
- Team Communicator
- Navigating Agent Desktop

Top 5 topics

1. Getting Started
2. Navigating Agent Desktop
3. Calls
4. Contacts
5. Contact and interaction history